

Message Text

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ORIGIN EB-06

INFO OCT-01 EUR-12 ISO-00 FEA-01 AEC-05 AID-05 CEA-01

CIAE-00 CIEP-01 COME-00 DODE-00 FPC-01 H-01 INR-05

INT-05 L-02 NSAE-00 NSC-05 OMB-01 PM-03 RSC-01 SAM-01

OES-02 SP-02 SS-15 STR-01 TRSE-00 FRB-01 /078 R

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FM SECSTATE WASHDC

TO AMEMBASSY BRUSSELS PRIORITY

C O N F I D E N T I A L STATE 248746

E.O. 11652: GDS

TAGS: ENRG

SUBJECT: IEP: OIL DATA ON TURKEY

BRUSSELS PASS BOSWORTH

FOR DELIVERY AT OPENING OF BUSINESS NOVEMBER 12

1. TURKISH CRUDE PRODUCTION AMOUNTED TO 21.8 MILLION BARRELS (MMB), ABOUT 27 PERCENT OF TOTAL CONSUMPTION IN 1973, THE LATEST YEAR FOR WHICH WE HAVE FULL 12 MONTH DATA. IMPORTS WERE 57.7 MMB, PRINCIPALLY FROM SAUDI ARABIA (38 PERCENT) AND IRAQ (24 PERCENT). CRUDE EXPORTS WERE ZERO. TURKISH REFINERIES EXPORTED ABOUT 7.5 PERCENT OF THEIR OUTPUT; AND, ACCORDING TO THE TURKISH GOVERNMENT'S PETROLEUM ADMINISTRATION, MAINTAINED CRUDE OIL STOCKS OF 2.16 MMB (ABOUT 10 DAYS TOTAL CONSUMPTION OR 14 DAYS SUPPLY BASED ON IMPORTS). TURKISH TOTAL CONSUMPTION IN 1973 APPROXIMATELY 217 MBD.

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2. A MAJOR U.S. OIL COMPANY WITH OPERATIONS IN TURKEY

REPORTED THAT THERE ARE NO COMPULSORY STORAGE REQUIREMENTS IN TURKEY AND THAT NORMAL REFINERY STOCKS ARE ABOUT 20 DAYS OF CRUDE AND 40 DAYS OF REFINED PRODUCT.

3. REFINERY STOCKS OF UNFINISHED OILS AND REFINED PRODUCTS AMOUNTED TO 856 THOUSAND BARRELS (MB) AND ABOUT

397.9 METRIC TONS (ABOUT 2.96 MB) RESPECTIVELY ON DECEMBER 31, 1973. A FURTHER 310 THOUSAND METRIC TONS (ABOUT 2.33 MMB) OF REFINED PRODUCTS WAS HELD BY DISTRIBUTING COMPANIES.

4. TOTAL STOCKS UNDER A ROUGH APPROXIMATION OF THE OECD DEFINITION WOULD BE ABOUT 1,191,000 METRIC TONS OR 8.3 MMB. AT FIRST GLANCE WITH LIMITED DATA AVAILABLE, ALL OF TURKEY'S REFINERY STOCKS APPEAR TO FALL UNDER THE OECD STOCK DEFINITION. THIS MAY BE TOO GENEROUS SINCE WE DO NOT KNOW THE AMOUNT LISTED UNDER REFINERY STOCKS WHICH MAY IN FACT BE PIPELINE FILL AND THUS BE EXCLUDED FROM THE OECD DEFINITION. NOR CAN WE BE CERTAIN OF THE SEASONAL FACTORS IN PRODUCT INVENTORY WHICH WOULD CHANGE THE PER BARREL YIELD AND ALTER THE AVERAGE 7.5 BARREL PER METRIC TON CONVERSION FACTOR USED. HOWEVER, IF WE ASSUME STOCKS ARE IN FACT ABOUT 8.3 MMB AND SUBTRACT 10 PERCENT (.8MMB) AS "UNAVAILABLE," THE REMAINING 7.51 MMB, ASSUMING AN IMPORT REQUIREMENT OF 158 MBD, WOULD YIELD ABOUT 47.5 DAYS OF STOCKS.

5. TURKISH ACCESSION TO THE IEP WOULD REQUIRE CONSIDERABLE ADDITIONAL STOCKS AND STORAGE CAPACITY TO MEET THE INITIAL TARGET OF 60 DAYS. NEW STORAGE FOR ABOUT 1.9 MMB (12 DAYS AT 158 MBD) WOULD BE REQUIRED COSTING PERHAPS DOLS 12 MILLION FOR FILL AND ANOTHER DOLS 10 TO DOLS 15 MILLION FOR CONSTRUCTION.

6. IN ADDITION TO ITS REPORTED STOCKS AT REFINERIES AND DISTRIBUTORS, TURKEY ALSO HAS MILITARY STOCKS OF JET FUEL, AVIATION GAS, DISTILLATES AND FUEL OILS. MOST RECENT NATO REPORTS INDICATE THESE STOCKS AMOUNT TO ROUGHLY 646 MB (274 MB OF THIS IS JET FUEL IN COMMERCIAL

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STORAGE WHICH MAY BE INCLUDED IN PARA 3 ABOVE). TURKEY HAS A NATO REPORTED STORAGE CAPACITY FOR MILITARY USE OF SOME 890 MB. KISSINGER

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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 JAN 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: PETROLEUM, DATA, EXPORTS, IEP
Control Number: n/a
Copy: SINGLE
Draft Date: 12 NOV 1974
Decaption Date: 01 JAN 1960
Decaption Note:
Disposition Action: RELEASED
Disposition Approved on Date:
Disposition Authority: golinofr
Disposition Case Number: n/a
Disposition Comment: 25 YEAR REVIEW
Disposition Date: 28 MAY 2004
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1974STATE248746
Document Source: CORE
Document Unique ID: 00
Drafter: WARILEY:CJR
Enclosure: n/a
Executive Order: GS
Errors: N/A
Film Number: D740325-0071
From: STATE
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1974/newtext/t19741150/aaaabqgy.tel
Line Count: 110
Locator: TEXT ON-LINE, ON MICROFILM
Office: ORIGIN EB
Original Classification: CONFIDENTIAL
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 3
Previous Channel Indicators:
Previous Classification: CONFIDENTIAL
Previous Handling Restrictions: n/a
Reference: n/a
Review Action: RELEASED, APPROVED
Review Authority: golinofr
Review Comment: n/a
Review Content Flags:
Review Date: 08 APR 2002
Review Event:
Review Exemptions: n/a
Review History: RELEASED <08 APR 2002 by izenbei0>; APPROVED <12-Aug-2002 by golinofr>
Review Markings:

Declassified/Released
US Department of State
EO Systematic Review
30 JUN 2005

Review Media Identifier:
Review Referrals: n/a
Review Release Date: n/a
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
Secure: OPEN
Status: NATIVE
Subject: IEP: OIL DATA ON TURKEY BRUSSELS PASS BOSWORTH
TAGS: ENRG
To: BRUSSELS
Type: TE
Markings: Declassified/Released US Department of State EO Systematic Review 30 JUN 2005